

Notice of Intent to Certify Sole Source

To: Interested Parties

From: David C. Johnson

CC: ITS Project Number 46241

Date: January 26, 2021

Re: Sole Source Certification Number 4366 to provide the interRAI Home Care (HC) Courseware Subscription for the Mississippi Division of Medicaid (MDOM)

Contact Name: Justin Faucette

Contact Phone Number: 601-432-8165

Contact E-mail Address: Justin.Faucette@its.ms.gov

Sole Source Certification Award Details

Regarding Information Technology Services (ITS) Sole Source Certification Number 4366 for the Mississippi Division of Medicaid (MDOM), please be advised that ITS intends to award Relias, LLC, as the sole source provider of the interRAI Home Care (HC) Courseware Subscription through February 16, 2022 in an amount not to exceed \$53,055.14. Should MDOM choose to continue using this assessment tool and require the courseware subscription, then this certification is valid through February 16, 2024. Please be advised that ITS will determine if additional subscriptions are within scope during the certification period and may increase the spending authority accordingly. Should Relias, LLC change their name during this certification period, then ITS will determine if a recertification is necessary. For an explanation regarding Mississippi state law, policy and procedures for sole source procurements, refer to Attachment C: Sole Source Procurement Overview.

Sole Source Criteria

1. The product or services being purchased must perform a function for which no other product or source of services exist:

The Centers for Medicare & Medicaid Services (CMS) requires a standardized core assessment in a Long-Term Services and Support systems (LTSS) for Home and Community Based Services (HCBS) Waivers and Nursing Facility (NF) admissions. Based on the CMS standardized core assessment requirements, MDOM contracted with interRAI for an online assessment tool at no cost that integrated with MDOM's current LTSS. InterRAI was developed for use with adults in home and community-based settings that require formal home and supportive services. InterRAI provides scales and indices that can be used to evaluate an individual's current clinical status. The interRAI Home Care courseware subscription, provided by Relias, offers

comprehensive solutions for home healthcare providers to improve patient outcomes. The courseware provides consultation services to ensure trainer competency and provide e-learning that is streamlined to ensure that learners only receive training that they need, saving MDOM time and money. There are approximately 600 assessors that are required to complete the certification on an annual basis.

The Single Sign On (SSO)/HR Pack allows MDOM's web portal system that MDOM currently uses to manage user accounts and passwords, to bypass the need for users to enter a username and password to access AIS Central. It allows MDOM to import staff counts and competency evaluation results from AIS Central into an existing human resources system. The customer's sole source certification request is included as Attachment A.

2. The purchaser must be able to show specific business objectives that can be met only through the unique product or services:

InterRAI Home Care (HC) assessment courseware is an integrated component of the LTSS that MDOM is currently utilizing through FEI, Inc. There is no charge to the State for the InterRAI Home Care (HC) Courseware tool; however, the courseware requires an online subscription for training that is provided by Relias. With the interRAI Home Care courseware, users will be able to complete training assessments and receive necessary certifications once the courseware is completed. The customer's sole source certification request is included as Attachment A.

3. The product or services must be available only from the manufacturer and not through resellers who could submit competitive pricing for the product or services:

InterRAI is the original developer and owner of all the intellectual property for the interRAI Home Care assessment tool and is the only organization able to provide up-to-date and comprehensive training on all aspects of the implementation of these instruments in Mississippi. In addition, interRAI requires a license for any organization to develop electronic products (such as e-Training) that incorporate its intellectual property. Relias, LLC, through its affiliate AIS Inc., is the only firm currently licensed by interRAI to distribute InterRAI software through its learning management system. The Vendor's sole source certification letters are included as Attachment B.

Schedule

Task	Date
First Advertisement Date	01/26/2021
Second Advertisement Date	02/02/2021
Response Deadline From Objectors	02/09/2021 at 3:00 P.M. Central Time
Notice of Award/No Award Posted	Not before 02/10/2021

Project Details

In 2012, MDOM received a federal grant from CMS for state incentives to improve its programs for LTSS. As part of accepting that grant, the State was required to implement certain structural change requirements: 1) Implement a No Wrong Door System; 2) Implement a Core Standardized Assessment meeting all required data elements; and 3) Ensure the provision of Conflict Free Case Management.

In July 2014, MDOM executed a License Agreement with interRAI Corporation to obtain the right to use, publish, and distribute interRAI Home Care, and in October 2014, MDOM contracted with interRAI Corporation for professional services to provide MDOM with a model interRAI Home Care assessor curriculum.

On December 11, 2018, ITS issued Sole Source Certification Number 4135 for interRAI Home Care (HC) Courseware Subscription for MDOM. ITS awarded Relias Learning, Inc. as the sole source provider of the services through February 16, 2020, with the option to continue through February 19, 2021, in an amount not to exceed \$99,043.31. No objections were received. During the contract negotiation period, it was determined that the company name for Relias Learning, Inc. should be Relias, LLC. Sole Source Notice of Intent 4238 was issued to correct the Vendor's name to Relias, LLC and to extend the agreement through February 16, 2021.

MDOM is seeking to obtain a 1-year Agreement to renew the interRAI Home Care (HC) Courseware Subscription. MDOM has spent to date \$224,516.93 with Relias, LLC for this subscription.

Submission Instructions and Format of Response from Objecting Parties

Interested parties who have reason to believe that the interRAI Home Care (HC) Courseware Subscription should not be certified as a sole source should provide information in the following format for the state to use in determining whether or not to proceed with awarding the Sole Source contract to Relias, LLC.

1.1 Interested Party Information

1.1.1 Contact Name, Phone Number and email address

1.1.2 Company Website URL, if applicable

1.2 Objection to Sole Source Certification

1.2.1 Interested parties must present specific objections to the Sole Source certification using the criteria listed above.

1.2.2 A statement regarding the Interested Party's capabilities as related to this Sole Source Certification Request.

1.3 Comments will be accepted at any time prior to Tuesday, February 9, 2021, at 3:00 p.m. (Central Time) to Justin Faucette at Justin.Faucette@its.ms.gov or at the Mississippi Department of Information Technology Services, 3771 Eastwood Drive, Jackson, Mississippi 39211. Responses may be delivered by hand, via regular mail, overnight delivery, e-mail or by fax. Fax number is (601) 713-6380. ITS WILL NOT BE RESPONSIBLE FOR DELAYS IN THE DELIVERY OF RESPONSES. It is solely the responsibility of the Interested Parties that responses reach ITS on time. Interested Parties may contact Justin Faucette to verify the receipt of their Responses. Responses received after the deadline will be rejected.

1.4 Interested Party responses should include the following information:

SUBMITTED IN RESPONSE TO
Sole Source Certification No. 4366-46241
Accepted until February 9, 2021 @ 3:00 p.m.,
ATTENTION: Justin Faucette

If you have any questions concerning the information above or if we can be of further assistance, please contact Justin Faucette at 601-432-8165 or via email at Justin.Faucette@its.ms.gov.

Attachment A: Customer Sole Source Certification Request
Attachment B: Vendor Correspondence
Attachment C: Sole Source Procurement Overview



3771 Eastwood Drive
Jackson, Mississippi 39211
Phone 601-432-8000 Fax 601-713-6380

Sole Source Certification Request

Project Title: interRAI Home Care (HC) Courseware Subscription			Stimulus (ARRA) Funds? Yes No <u>X</u>	
Customer Contact Information				
Agency/Public University: MS Division of Medicaid Address: 500 High Street, Ste. 1000 Jackson, MS 39201			Contact Person: Grant Banks Phone: 601-359-6153 Email Address: grant.banks@medicaid.ms.gov	
MAGIC Customer Number (only required from state agencies):			Division/Dept.: Handmail: <input type="checkbox"/> Yes <input type="checkbox"/> No	
Project Summary Narrative Description of Project (include details of original acquisition if applicable): In 2012, a federal grant was received from the Centers for Medicare & Medicaid Services (CMS). CMS requires a standardized core assessment/ algorithm in a Long Term Services and Support systems (LTSS) for Medicaid Home and Community-Based Services (HCBS) waiver program and for Nursing Facility (NF) admissions. This assessment tool provides scales and indices that can be used to evaluate an individual's current clinical status. The level of care score from this assessment are generated upon completion and submission with the beneficiary application.				
ITS Acquisition Approval (CP-1) should be effective through this date (Please allow time for all vendor invoices to be paid):				
Cost Estimates <i>Fiscal Year</i>	Initial Costs	Ongoing Costs	Time Constraints Item Needed by: 02/17/21 Funds Expire:	Anticipated Lifecycle of Products/System (i.e. estimated years of effective use): 1 year
FY22		\$53,055.14	Discuss Funding (e.g. how much of needed funding is definite; total project budget; any matching or other non state funds).	
Total		\$53,055.14		
Acquisition Details				
Items Requested	Quantity	Description		Building Location(s)
InterRAI Home Care (HC) assessment courseware	585	training and assessor certification for InterRAI assessment tool		
Single Sign-On/ HR Pack	1	SSO, Licensing, support, and maintenance		
Describe platform & infrastructure (connectivity; software/hardware platforms; utilization of State Data Center resources: mainframe, eGovernment portal, payment engine, document management, hosting). For equipment or hosting outside the State Data Center, attach justification: N/A				
Progress to Date: What has been done related to this project, including any communication with ITS staff (data/voice/procurement/other)? No previous contact with ITS staff has occurred.				
Sole Source Certification Note: Certification must be renewed for each revision or continuation of previous Sole Source Approvals.				
Specific business requirements to be met by the requested products or services: InterRAI Home Care (HC) assessment courseware is an integrated component of the LTSS that MDOM is currently utilizing though FEI, Inc. There is no charge to the State for the InterRAI Home Care (HC) Courseware tool; however, the courseware requires an online subscription for training that is provided by Relias. With the interRAI Home Care courseware, users will be able to complete training assessments and receive necessary certifications once the courseware is completed.				
Explain why these products or services are the only ones that can meet your needs (include unique features/special functionality): The Centers for Medicare & Medicaid Services (CMS) requires a standardized core assessment in a Long-Term Services and Support systems (LTSS) for Home and Community Based Services (HCBS) Waivers and Nursing Facility (NF) admissions. Based on the CMS standardized core assessment requirements, MDOM contracted with interRAI for an online assessment tool at no cost that integrated with MDOM's current LTSS. InterRAI was developed for use with adults in home and community-based settings that require formal home and supportive services. InterRAI provides scales and indices that can be used to evaluate an individual's current clinical status. The interRAI Home Care courseware subscription, provided by Relias, offers comprehensive solutions for home healthcare providers to improve patient outcomes. The courseware provides consultation services to ensure trainer competency and provide e-learning that is streamlined to ensure that learners only receive training that they need, saving MDOM time and money. There are approximately 600 assessors that are required to complete the certification on an annual basis.				
The Single Sign On (SSO)/HR Pack allows MDOM's web portal system that MDOM currently uses to manage user accounts and passwords, to bypass the need for users to enter a username and password to access AIS Central. It allows MDOM to import staff counts and competency evaluation results from AIS Central into an existing human resources system.				
Explain why the source is the only entity that can provide the products or services (Include other products/vendors researched or evaluated): InterRAI is the original developer and owner of all the intellectual property for the interRAI Home Care assessment tool and is the only organization able to provide up-to-date and comprehensive training on all aspects of the implementation of these instruments in Mississippi. In addition, interRAI requires a license for any organization to develop electronic products (such as e-Training) that incorporate its intellectual property. Relias, LLC, through its affiliate AIS Inc., is the only firm currently licensed by interRAI to distribute InterRAI software through its learning management system.				
Vendor's Certification of Sole Source attached: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Vendor's proposal submitted: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No				
MAGIC Vendor Code(s) Vendor must be in MAGIC before a CP-1 can be issued.				
Place Order To Vendor Name: Relias, LLC Vendor Address: 111 Corning Road, Suite 250, Cary, NC 27518		Remit To Vendor Name: Relias, LLC Vendor Address: 111 Corning Road, Suite 250, Cary, NC 27518		

By my signature, I certify that, to the best of my professional knowledge: the requested product or services are a sole source as outlined in the ITS Procurement Handbook, Rule 207.2:013-030 Procurement Types: Sole Source, and as outlined in Mississippi Code annotated Section 31-7-13. In addition, I acknowledge that there is a charge for ITS procurement services associated with this request which will be billed to the requestor by ITS and that my agency/public university is responsible for these charges/costs.

Dan Snyder / Exec. Dir.

Name (Agency Head or Public University CIO)/Title



Signature

1/26/24

Date



December 10, 2020

TO WHOM IT MAY CONCERN:

interRAI is the original developer and owner of all of the intellectual property for the interRAI Home Care assessment involved this contract. As such, it is the only organization able to provide up-to-date and comprehensive training on all aspects of the implementation of these instruments in Mississippi. In addition, interRAI requires a license for any organization to develop electronic products (such as e-Training) that incorporate its intellectual property, and AIS/Relias is the only firm currently licensed by interRAI for e-Training.

Please contact me if you have any questions or need additional information.

Yours truly,

A handwritten signature in black ink, appearing to read "Brant E. Fries", with a long horizontal line extending to the right.

Brant E. Fries, Ph.D.
President

*Brant E. Fries, Ph.D., President, 3577 Delhi Overlook,
Ann Arbor, Michigan 48103, USA; e-mail: bfries@umich.edu*



December 11, 2020

Mississippi Division of Medicaid 550 High Street Suite 1000
Jackson, MS 39201
United States

Re: Sole Source Confirmation

To Whom It May Concern,

This letter is to confirm that Relias LLC ("Relias") through its affiliate AIS Inc., has a license to distribute InterRAI software through its learning management system. InterRAI requires a license for any organization to develop electronic products (such as e-Training) that incorporate its intellectual property, and AIS/Relias is the only firm currently licensed by interRAI for e-Training.

Relias does not have a published price list for its subscription services, including provisions of the InterRAI software.

Please feel free to contact us with any further questions at contracts@relias.com.

Sincere regards,

Joanna Smith

Joanna Smith
Associate General Counsel
Relias LLC

The acquisition of information technology for all state agencies and institutions of higher learning (IHLs) is within the scope of the ITS law, found in Mississippi Code Section 25-53-1, et seq., and the policies and procedures established in accordance with this statute, found in the ITS Procurement Handbook posted on the ITS website (www.its.ms.gov).

ITS enabling legislation requires that information technology hardware, software and services be acquired in a manner that insures the maximum of competition among all manufacturers and suppliers of such equipment and services. Accordingly, ITS promotes full and open competition through the issuance of open specifications and the objective evaluation of Interested Party proposals to determine the lowest and best offering to meet an agency's or public university's business requirements. True competition protects the integrity and credibility of purchasing in the public sector and is essential in providing best value and adequate contractual protection for the purchasing entity. In certain limited situations, information technology acquisitions may be sole-sourced.

ITS utilizes the provisions of Public Purchasing Law for Sole Source and Emergency procurements of information technology. Mississippi Public Purchasing Law (Mississippi Code Section 31-7-13) specifies that noncompetitive items available from one source only be exempted from bid requirements (sole-sourced). ITS statute, in Section 25-53-5 (p), permits ITS to utilize provisions in Public Purchasing Law or regulations, when applicable.

Per Public Purchasing law, acquisitions must meet the following criteria to be authorized as sole source:

1. The product or services being purchased must perform a function for which no other product or source of services exists,
2. The purchaser must be able to show specific business objectives that can be met only through the unique product or services, AND
3. The product or services must be available only from the manufacturer and NOT through resellers who could submit competitive pricing for the product or services. The vendor's correspondence regarding this criterion for this project is included as Attachment B.

By policy as documented in the ITS Procurement Handbook, acquisitions of IT services must include the following information to be authorized as sole source:

1. An explanation about why the amount to be expended is reasonable, and
2. An explanation regarding the efforts by the purchaser to obtain the best possible price.

For state agencies, approval of all technology purchases with a lifecycle cost of \$5,000 or less, including sole source purchases, has been delegated to the agency. The ITS Procurement Limits Policies for Agencies (a section in the ITS Procurement Handbook) require a minimum of two competitive written bids or proposals for technology purchases with a lifecycle cost over \$5,000 but not over \$50,000 (not over \$25,000 for projects funded by the American Recovery and Reinvestment Act). Since, for single source items, the procuring agency will be unable to obtain two written bids, ITS must certify all sole source acquisitions of information technology with a lifecycle cost greater than \$5,000.

Institutions of Higher Learning (IHLs) or public universities have been delegated the authority to certify sole source procurements up to \$250,000 lifecycle cost under the ITS Procurement Limits Policies for IHLs (a section in the ITS Procurement Handbook). For the certification of sole source procurements delegated to the CIOs at public universities, the public university must follow ITS' Sole Source Procedure, including advertisement of the intent to award as sole source. Institutions certifying a sole source purchase must ensure the criteria listed above are met and documented in writing by the institution and the Interested Party prior to certifying a product or service as sole source. Sole source documentation must be reviewed and approved by the IHL's CIO for any sole-source certification

above \$5,000. All sole source documentation should be retained in the public university's procurement file. Sole source requests above \$250,000 lifecycle cost require ITS approval.

Other than the delegations outlined above, all sole source technology procurements must be certified by ITS. The customer's Sole Source Certification Request for this project is included as Attachment A.

ITS thoroughly reviews Sole Source Certification Requests, determining if competing products and/or services exist. If so, ITS conducts a competitive procurement. If ITS' review confirms the sole source, then a Sole Source advertisement is issued, giving other Interested Parties an opportunity to identify competing products and/or services. Based upon the results of the Sole Source advertisement, ITS will either certify the request as a sole source or conduct a competitive procurement.